RESOURCE AND PATIENT MANAGEMENT SYSTEM

EHR CAC Review Course

Announcement and Agenda

June 17-21, 2013

Office of Information Technology, Albuquerque, New Mexico
and
Aberdeen Area (Sioux Falls VA),
Alaska Native Tribal Health Consortium, Bemidji Area Office,,
Nashville Area Office, California Area Office, Northwest Portland Area
Indian Health Board
Oklahoma City Area Office, Phoenix Area Office, Phoenix Area Office
(Reno)

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1.0   General Information

1.1   Purpose of Training

According to the Health Information Management Systems Society (HIMSS), "integration of clinical workflow and business strategies of any healthcare organization will spell success for the providers of the future". Efficient exchange of data and information is essential for this merger, and information technology is the tool with which to accomplish the consolidation.

Clinical Informatics is the combination of clinical knowledge and data used to increase quality of care. In addition, informatics conveys the understanding and integration of information technology into healthcare to ensure the effective provision and to support the business objectives of clinicians in healthcare industries. Nursing Informatics applies information technology to the work of nurses in healthcare while Medical Informatics is the name given to the application of information technology to medicine. The informaticist focuses on application of technology, medical care, nursing care, and pharmaceutical care in supporting, streamlining, improving interactions between people and their workflow, and increasing patient safety with best practices and reliable systems.

Because more of medicine is data-driven and computer assisted, there has been a growing demand for nurses, physicians, and other health care professionals to acquire knowledge and experience in the principles, practices, and techniques of informatics. This five-day course will further prepare the informaticist for the advanced application of the Resource Patient Management System Electronic Health Record (RPMS EHR) within the patient care setting through optimization of certified electronic health record technology to meet Meaningful Use (MU) and advance clinical quality care through the utilization of clinical applications.

The objective of this hands-on classroom course is to explore advanced informaticist concepts for electronic health record processes and practices with specific roles in the Clinical Application Coordinator (CAC) informaticist arena. All classroom sessions are Monday thru Friday from 8:30 AM – 5:00 PM Mountain Time.

This training will use Internet-based videoconferencing and collaboration technology to connect classrooms located throughout the Indian Health Care System. All students will be participating from one of the designated training locations. Instructors and facilitators will teach using the educational techniques of lecture, discussion, scripts, and hands-on computer experience.

> **Disclaimer**: This class is for Electronic Health Record-related knowledge. There are many RPMS clinical applications (i.e., Reminders, Pharmacy, and iCare) that have separate training sessions. This class is focused on the EHR application. Please see the RPMS Training Web Site for an upcoming training in your area.

1.2   Prerequisites

This class will be oriented towards CACs, Pharmacy Informaticist, Laboratory Informaticist, HIM Professionals, Site Managers, EHR Implementation Team Leaders and other EHR Team Members involved with the set-up and implementation of EHR at their facility. Facilities that have loaded Pharmacy 5/7 and EHR at their facility prior to this class will be able to work on their own systems during the training. This advanced course assumes that participants are Intermediate to Advanced RPMS Users and have experience with RPMS Packages to include:

- Patient Registration
- Scheduling
- Pharmacy
- Laboratory
- Radiology
- Patient Tracking
- Diabetes Management System
- Immunization
- Women's Health
- Clinical Reporting System
- Q-Man
- PCC Management Reports

1.3   Guidelines for Receiving Certificate

To receive a **certificate of completion,** you must attend the educational event in its entirety and successfully complete an on-line evaluation (Survey Monkey) of the seminar within 15 days of the activity.

2.0   Learning Objectives

This hands-on class provides an overview of the RPMS packages and preparation required for EHR maintenance and includes instructions for newly released features. Included in this course, participants are provided with the knowledge, skills, and abilities to fully utilize the EHR and instruct other clinicians in its use and offer participants the tools necessary for setting up the EHR. At the end of this session participants will be able to:

- Provide an overview of the RPMS EHR.

- Integrate EHR V1.1 P11 and BJPN Prenatal Module into EHR workflow.

- Review RPMS Package Optimization.

- Examine the EHR framework.

- Define the expectations, roles and responsibilities of the:

  - CAC
  - EHR Super User
  - Site Manager
  - RPMS Informaticist
  - Other EHR Work Group Team Members

- Delineate effective project management processes and techniques essential for EHR maintenance and continued success.

- Navigate throughout EHR tabs.

- Process Notifications.

- Review Cover Sheet Information.

- Enter Allergies and Vital Signs.

- Enter and correct Progress Notes.

- Document Exams, Health Factors, Patient Education, and Immunizations.

- Enter Consult requests.

- Complete a Consult.

- Perform pharmacy, laboratory, and radiology order entry.

- Assign a Purpose of Visit.

- Update the Problem List.

- Document Historical Services.

- Summarize basic EHR setup.

- Set up a User.

- Turn specific Notifications on or off.

- Set, enable and disable Order Checks.

- Enter and edit Order Menus and Quick Orders.

- Review basic document Parameters.

- Create, edit, finish, and import a Text Integration Utility (TIU) Template and create TIU data objects.

- Review Consult service.

- Review keys and parameters needed to enter Patient Care Component (PCC) data to include making a Super-Bill and create an ICD-9 pick-list and patient education.

- Utilize Associations for Super-Bills.

- Review Design Mode.

- Create VA and IHS Health Summaries.

3.0   Instructors and Facilitators

3.1   Office of Information Technology, Albuquerque, NM

- CAPT (ret) David R. Taylor MHS, RPh, PA-C, RN, OIT EHR Training and Deployment Manager
- Philip K. Taylor, BA, RN, Clinical Consultant (Contractor Medsphere Systems)

3.2   Aberdeen Area, Sioux Falls, SD

- CAPT Leslye Rauth, MPH, RD, CDE, Clinical Application Coordinator - Aberdeen
- Martin Hall, Sioux Falls/Aberdeen Area Tier 2

3.3   Alaska Native Tribal Health Consortium, Anchorage, AK

- Kimiko Gosney, MS, CC(NRCC), ANTHC Clinical Application Coordinator
- Benjamin Tsosie, BSIT, Health Information Exchange Administrator
- Scott Dufour, BSIT, Clinical Application Trainer

3.4   Bemidji Area

- Teresa Chasteen, RHIT, Bemidji Area Clinical Application Coordinator

3.5   California Area

- Steven Viramontes, BSN, PHN, California Area Clinical Application Coordinator
- Marilyn Freeman, RHIA, California Area Clinical Application Coordinator
- Natalie Klier , CCS-P California Area Clinical Application Coordinator Mentor
- Emmanuel Yennyemb, MBA, CSAP – Clinical Applications Coordinator Mentor

3.6   Oklahoma City Area

- CDR Amy Rubin, PharmD, MMI, Oklahoma City Area Clinical Application Coordinator
- Robin Thompson, MS, APRN, CNS, Oklahoma City Area Assistant Clinical Application Coordinator

3.7   Phoenix Area

- CAPT Elvira Mosely, MSHS, RN, Phoenix Area Clinical Application Coordinator

3.8   Phoenix Area (Reno)

- Anna Wilson, Phoenix Area Clinical Application Coordinator (Reno)

3.9   Portland Area

- CDR Cornelius Dial, RPh, Portland Area Clinical Application Coordinator

- LCDR Katie Johnson, PharmD, Northwest Portland Area Indian Health Board EHR Integrated Care Coordinator, Manager NPAIHB Regional Extension Center

3.10   Nashville Area

- CDR Robin Bartlett, PharmD, MSP, NCPS, Nashville Area Clinical Application Coordinator

- CAPT Deborah Burkybile, MSN, RN, CPC, Office of Information Technology and United South and Eastern Tribes Regional Extension Center EHR Deployment Specialist

4.0   Detailed Agenda

All times are Mountain Time!

4.1   Monday

Start	Topic	TAB#
8:30	**Welcome and Introductions** **Leslye Rauth, Amy Rubin, Robin Bartlett, Robin Thompson** Definitions and roles of the Informaticist and Informatician During this session participants will: • Review the use of ThinkTank® collaboration software. • Review the principles, practices, and techniques for collecting ideas using collaboration tools and technology. • Identify participant needs and expectations using ThinkTank collaboration technology software. • Define Health Information Technology, Informaticist, and Informatician. • Compare and contrast roles and responsibilities of the CAC, Site Manager, Nurse Informaticist, Medical Informaticist, EHR Super End User, EHR User, and EHR Team.	Tab 01
9:30	**Indian Health Care System Electronic Health Record Learning Community** **Leslye Rauth and Robin Thompson** During this session participants will: • Examine the concepts of learning communities where groups are linked by shared interests, goals, interactions, and acquisition of knowledge. • Explore the EHR learning community tools available to include (a) IHS EHR Web Page, (b) FTP site, (c) listserv archive, (d) RPMS enhancement request, (e) RPMS Training Page, and (f) RPMS Clinical Applications Page.	Tab 01
10:00	Break	
10:15	**MU Performance Measure and Clinical Quality Measures** **Joanne Hawkins and Amy Rubin** During this session participants will: • Examine the Meaningful Use Stage 1 2013 changes. • Examine the Meaningful Use Stage 2 Performance Measures.	Tab 02
11:30	Lunch	

Start	Topic	TAB#
1:00	**Medication Reconciliation Overview** **Wil Darwin** During this session participants will: • Recall the MU requirements for meeting the Medication Reconciliation Performance Measure. • Design the necessary components and required documentation for meeting the Medication Reconciliation Performance Measure. • Integrate the use of the Patient Wellness Handout in the Medication Reconciliation process. • Compare and contrast the Outside Medications functionality with Outpatient and Inpatient Medications functionality. • Explain why Outside Medications Data Population is important in maintaining a complete medication profile. • Utilize the principles, practices, and techniques for documenting patient reported medications.	Tab 03
2:30	Break	
2:45	**RPMS Package Optimization** **Phil Taylor** During this session participants will: • Explain the importance of precise information technology setup, configuration and maintenance. • Review the clinical components of an electronic health record and how proper configuration and optimization impact end-user functionality. • Discuss the importance of identifying RPMS Package Owners who will accept responsibility for on-going maintenance of individual components of an electronic health record. • Work collaboratively across disciplines to define, discuss and plan a process for updating and maintaining components of an electronic health record and the importance of communicating changes and updates to end-users.	Tab 04
3:30	**RPMS Package Optimization - Hands-on Exercises** **Phil Taylor** During this session participants will: • Edit a patient in Patient Registration. • Create new clinic. • Review immunization parameters. • Review Adverse Reaction tracking parameters. • Review PCC Master Control File. • Review GPRA taxonomies.	Tab 04
5:00	Adjournment	

4.2   Tuesday

Start	Topic	TAB#
8:30	**Review Previous Days Training** **Leslye Rauth, Amy Rubin, Robin Bartlett, Robin Thompson** Think Tank (Review Entries)	
9:00	**Health Summaries & Flowsheets for BJPN Prenatal Module & EHR V1.1 P11** **Phil Taylor** During this session participants will: • Review the correct configuration for PWH • Create BJPN Prenatal Module Health Summaries (Prenatal First Trimester, Prenatal Second Trimester, Prenatal Third Trimester, Prenatal Comprehensive Data Summary) • Create EHR V1.1 P11 Health Summaries (Anticoagulation, Eye Glass Prescription) • Configure Prenatal Flowsheet	Tab 05
10:00	Break	
10:15	**Health Summaries & Flowsheets** (continued) **Phil Taylor**	Tab 05
11:30	Lunch –	
1:00	**Parameters** **Phil Taylor** During this session participants will: • Identify EHR customization and workflow process (parameters). • Align EHR with the clinical workflow process through configuration and parameter settings. • Ensure EHR complies with security requirements • Control access to EHR components through parameter settings. • Customize EHR components to improve usability. • Examine the importance of adopting a standardized process for setting and editing parameters within an electronic health record. • Apply parameter configuration to specific levels to meet the needs of users and the institution. • Review the new parameters for EHR V1.1 P11 & BJPN Prenatal Module	Tab 06
2:30	Break	

Start	Topic	TAB#

2:45	**User Setup and Personal Preferences**
	 Kimiko Gosney
	 During this session participants will:
	 • Identify various data components that are required when setting up a new user.
	 • Determine when the CAC will need to initiate the new user process for staff members.
	 • Examine the various keys and user classes that the new user may be assigned according to credentials.
	 • Demonstrate the steps used in establishing an electronic signature for the new user.
	 • Identify where NPI Number, DEA Number, Professional Licensure and SPI Number are populated.
	 • Compare and contrast the unique roles of users, who enter orders into an electronic health record.
	 • Customize EHR configuration to meet the unique needs of end users through utilization of:
	   • New Person file
	   • Provider file
	   • User class
	   • Person class
	   • Ordering keys
	   • Electronic signatures
	   • Clinical application keys
	   • Secondary Menus (BMXRPC, BJPNRPC, VEN RPC, Alert Tracking)
	   • Hands on Exercise
		Tab 07

5:00	Adjournment	

4.3   Wednesday

Start	Topic	TAB#
8:30	**Review Previous Days Training** **Leslye Rauth, Amy Rubin, Robin Bartlett, Robin Thompson** Think Tank (Review Entries)	

Start	Topic	TAB#
9:00	**Notifications** **Phil Taylor and Robin Thompson** During this session participants will: • Identify processes by which customizable notifications can be constructed to alert specific individuals when a certain event occurs in an electronic health record for ensuring patient safety and effective communication. • Configure electronic health record notifications to promote effective and timely communication of pertinent clinical information to end-users. • Categorize the types of notifications that can be used in an electronic health record and how these can help end-users in having needed information available to complete documentation. • Review new notifications (EHR V1.1 P11)	Tab 08
9:45	Break	
10:00	**Notifications** (continued) **Phil Taylor and Robin Thompson**	Tab 08
10:45	**TIU Templates and Data Objects** **Phil Taylor** During this session participants will: • Create a TIU Template to (a) facilitate communication, (b) promote quality patient care and patient safety, and (c) meet professional and legal standards. • Increase efficiency in documentation through implementation of well designed TIU Templates with point and click elements. • Ensure completeness, accuracy, and standardization of EHR documentation by providing structured TIU Templates. • Demonstrate the process of importing RPMS data elements via TIU Templates into progress notes to reduce double entry of data by end-users. • Demonstrate use of TIU Template components (data objects and template fields) to add clinically pertinent information to electronic orders and consult requests to improve quality of documentation. • Demonstrate the process for sharing TIU Templates between facilities and how to obtain prior-built note templates from IHS FTP site. • Utilize BJPN Prenatal Module Data Objects (Estimated Due Date, Pregnancy Due Date, Prenatal PIP All Notes, Prenatal PIP Current Notes, Prenatal PIP Latest Visits/Last Notes, Prenatal PIP Latest Visit, Prenatal POVs/Last Note, Prenatal POVs/Visit, Prenatal) • Utilize EHR V1.1 P11 Data Objects (PHN Data, Eyeglass Rx, AntiCoag) • Create TIU Data Objects that can be used in TIU Templates to reduce double entry of data by end-users. • Create Health Summary Data Object (Prenatal Comprehensive Data Summary)	Tab 09
11:30	Lunch	

Start	Topic	TAB#
1:00	**TIU Templates** (continued) **Phil Taylor**	Tab 09
2:30	Break	
2:45	**Quick Orders and Order Checks** **Phil Taylor** During this session participants will: • Understand construction and configuration of quick orders, order sets, and order menus. • Be familiar with namespaces used with quick orders and menus. • Understand the importance of consistency for support and future maintenance. • Understand Order Check configuration. • Understand Order Checks required for Meaningful Use. • Generate an On Demand Order Check on the Medications Tab. • Review modifications for EHR V1.1 P11 Orders (Discontinued Drug Orders, Flagged Orders, One Time Orders, Date Range Orders, Incorrect Orderable Items, Unreleased Orders, TIU Objects, Custom Orders, Sort DC Reasons, Flagged Orders, Selecting Orders, Leading Zeros, Lapsed Orders, Obsolete Orders, Delayed Orders, Inpatient Meds, Non-VA Meds, Outpatient Meds, Labs, Orderable Item Validations, Menu Management, Infusion Quick Order, Lab & Radiology Dialogue Box, Print Parameters)	Tab 10
5:00	Adjournment	

4.4   Thursday

Start	Topic	TAB#
8:30	**Review Previous Days Training** **Amy Rubin, Robin Bartlett, Robin Thompson** Think Tank (Review Entries)	
9:00	**Quick Orders and Order Checks** (continued) **Phil Taylor**	Tab 10
10:00	Break	

Start	Topic	TAB#
10:15	**Consults** **Robin Bartlett** During this session participants will: • Examine the electronic health record consult process from beginning to end. • Utilize electronic patient consult tools to promote coordination of care and collaboration between interdisciplinary providers. • Understand user configuration for receiving and resulting electronic consults. • Understand that a structured input template can ensure that needed information is included when requesting an electronic consult. • Generate a consult tracking report to ensure closed loop communication and assist in ensuring a complete and accurate record.	Tab 11
11:30	Lunch	
1:00	**Consults** (continued) **Robin Bartlett**	Tab 11
2:45	Break	
3:00	**Quick Notes** **Teresa Chasteen** During this session participants will: • Define Quick Notes and appropriate uses. • Configure Quick Notes. • Delineate steps for implementation and training of both Quick Notes. • Delineate steps for implementation and training of Quick Notes.	TAB 12
5:00	Adjournment	

4.5   Friday

Start	Topic	TAB#
8:30	**Examination of Course Content Review Previous Days Training** **Amy Rubin, Robin Bartlett, Robin Thompson** *THINK TANK DISCUSSION & OVERVIEW OF RESPONSES* Think Tank (Review Entries)	
9:00	**Generic Orders** **Phil Taylor** During this session participants will: • Compare and contrast use of simple text orders (Nursing Quick Orders) versus complex text orders (Generic Orders). • Articulate uses of Generic Orders and their advantages. • Create custom prompts to construct Generic Orders to meet the specific needs of patients and providers.	Tab 13
10:00	Break	
	Generic Orders (continued) **Phil Taylor**	Tab 13

Start	Topic	TAB#
11:30	Lunch	
1:00	**Customizing the EHR Graphical User Interface - Design Mode** **EHR V1.1 P11** **BJPN Prenatal Module (Pregnancy Issues & Problems, Prenatal Pick List)** **Phil Taylor and Amy Rubin** During this session participants will: • Understand the importance of aligning the graphical user interface (GUI) to clinical workflow. • Add the identified MU components to the EHR GUI template.(PWH Button, Chart Review, Patient Specific Education) • Add the identified EHR V1.1 P11 components to the EHR GUI template (Anticoagulation, Eye Glass Prescription, Level of Intervention (PHN) Components) • Add the identified BJPN Prenatal Module Components to the EHR GUI template (Pregnancy Issues & Problems, Prenatal Pick List) • Add the identified EHR V1.1 P11 & BJPN Prenatal Module Reports (Graphing (local only), Eyeglass Prescription, Prenatal First Trimester, Prenatal Second Trimester, Prenatal Third Trimester, Prenatal Comprehensive Data Summary, Prenatal Flowsheet, Prenatal Lab Worksheet) • Delineate a maintenance process for an EHR GUI template that may be required as software changes and updates occur. • Develop a process to apprise end users when significant changes must be made to the EHR user interface.	Tab 14
5:00	Class Adjournment Complete the Survey Monkey® evaluation Discuss, "Where do we go from here?" Discuss possible need for future office hour sessions	